

TRANSLATING GOALS INTO ACTION

A **strategy** is how you will achieve your goal. Strategies should be specific and measurable.

Strategies are implemented through **tactics**, the concrete actions that move the strategy forward.

While goals provide direction, strategies and tactics should be concrete enough to track over time. Tracking tactics helps organizations understand whether their strategy is increasing visibility, strengthening relationships, or generating engagement from candidates and campaigns (i.e., achieving the goal).

Below is a simple framework for this structure:

GOAL <i>The outcome you want to achieve</i>	STRATEGY <i>The approach you will take to achieve it</i>	TACTICS <i>The specific activities that implement the strategy</i>
<i>Elevate PN-3 priorities in the campaign conversation</i>	<i>Increase the public conversation about PN-3 issues related to the election</i>	<i>Place X number of LTEs or op-eds</i>
		<i>Post on social media with Y frequency</i>
		<i>Ask Z number of questions at forums</i>
	<i>Increase public engagement</i>	<i>Send A number of advocates to town halls</i>
		<i>Connect with B number of candidates via bird dogging</i>
		<i>Host policy roundtables with C candidates</i>

MAKE TACTICS ACTIONABLE AND TRACKABLE

Once you have selected which tactics will support your strategies, translate them into clear benchmarks that allow you to track progress. For example:

Trackable communications tactics

- Publish four LTEs across key regions
- Secure two mentions of PN-3 issues in press coverage
- Reach 10,000 constituents through digital engagement

Trackable public engagement benchmarks

- Coordinate PN-3 supporter turnout at three town halls
- Generate 10 constituent questions in public forums
- Recruit 20 new parent or provider advocates

Define who owns each benchmark and the deadline for completion.

REASSESS AND ADAPT

Campaigns are dynamic. Build in moments to evaluate:

- Is the list of candidates changing? New? Dropouts?
- Are candidates responding?
- Is public visibility increasing?
- Are relationships deepening?
- Do tactics need to shift?

If something isn't moving, adjust the strategy, not just the volume of activity.

LEGAL COMPLIANCE OF STRATEGIES AND TACTICS

While section 501(c)(3) organizations are prohibited from supporting or opposing candidates, the IRS allows these nonprofits to engage in a wide variety of efforts to educate candidates and the public about policy issues. This work must follow some key guidelines:

- **Treat all candidates equally:** For example, when conducting candidate education outreach, send materials to all candidates for a given office, and offer to meet with each for an in-person briefing. If only one or a few of the candidates accept the offer of a meeting, that's fine; you can't force the others to meet with you, but at least you tried. Similarly, do not create new materials at the request of a particular candidate.
- **Ask open-ended, neutral questions:** When engaging in birddogging, or posing questions at a candidate town-hall, ask candidates to discuss their positions, rather than asking pointed yes/no questions. Your question cannot indicate a bias or preference. A yes/no question – or asking a candidate to promise to take a particular action in office – will be viewed by the IRS as a tacit endorsement, because if you're showing which candidates agree or disagree with your organization, you're signaling which candidate(s) the audience should vote for.
- **Do not praise/thank/criticize candidates:** If a candidate adopts your policy proposals, or fails to do so, you cannot publicly comment on a candidate's decision.

